

Updates to the Orion Integration with Riskalyze - Just in Time for FI Summit 2017



Orion has integrated with Riskalyze for a number of years now, and we're excited to see them launch their user conference, the Fearless Investing Summit, this week.

If you're at the FI Summit, make sure to catch our team in the exhibit hall. We're right by the front door!

We also want to take this opportunity to highlight the expanded Orion integration with Riskalyze.

We now provide the Riskalyze Risk Number for a household, account, and even individual assets. With this change, Orion clients can now review the suitability and risk components that make up the full portfolio.

Reviewing suitability and risk components goes even farther than a full portfolio review, though. You can even compare suitability and risk information to the Model you have assigned to that client.

Orion shows three key numbers now: Your Questionnaire, Your Portfolio, and Your Model. In the screenshot below, you can see how these will display within Orion Connect.



The enhanced Riskalyze integration is now available in Insight and the Client

Portal.

Have some questions? Please contact the Orion Integration Support team through Orion Social.

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